

Letter of Intent

**McMaster University
(the Employer)
and
McMaster University Staff Association
(MUSA)**

- the “parties” -

JOB EVALUATION SYSTEM AND PROCESS

Whereas the Joint Working Conditions Committee has accepted the Report of the Working Group on Job Evaluation, and the Employer and MUSA have assigned to their respective Bargaining Teams responsibility for making certain determinations and taking certain actions with respect to the selection and implementation of a new job evaluation system and process, the parties agree as follows:

1. The parties will establish a Joint Job Evaluation Steering Committee (JJESC) comprised as follows:
 - (i) Three line Managers appointed by the Employer representative of the breadth of the bargaining unit, one of whom is from the Faculty of Health Sciences
 - (ii) Three Employees appointed by MUSA representative of the breadth of the bargaining unit, one of whom is from the Faculty of Health Sciences
 - (iii) Two expert advisors, one appointed by each party
 - (iv) Two alternate JJESC members, one appointed by each party.
 - Support for the JJESC and JRC will be provided by HRS staff who will not be members of the Committee.
 - The experts will be ex-officio, meaning that they will have voice, but no vote, on the JJESC
 - The parties on the JJESC will each appoint a Co-Chair
 - Managers and Employees, while performing functions for the JJESC or the JRC will be kept whole for the normal compensation of their position.

The JJESC will establish a Joint Rating Committee (JRC). The JRC will be composed of 6 (six) members, 3 (three) representing each of the parties. Depending on the requirements of the Job Evaluation (JE) system, the JJESC may determine it appropriate that the JRC be composed of more than one sub-committee. In this event, the JJESC will set out the basis for the integration and coordination of such sub-committees. The total membership of the JRC will not exceed 8 (eight) members (four representing each of the parties).

2. Roles and Functions of the JJESC and the JRC

JJESC

i) The JJESC will develop or select a job evaluation system that best meets the following criteria:

- a) Fairly and equitably measures the skill, effort, responsibility and working conditions of all positions in the bargaining unit and establishes the values of jobs relative to each other;
- b) Is transparent and understandable by those who rely on it;
- c) Meets all legal requirements and is gender neutral within the meaning of the *Pay Equity Act*;
- d) Capable of measuring the full range of jobs in the bargaining unit;
- e) Capable of reflecting the values of the University as a workplace;
- f) Is relatively easy to implement and difficult to misinterpret;
- g) Capable of being updated, or adjusted as the requirements of the workplace and legislative environment change;
- h) Takes advantage of computer technology (but is not “self-rated”).

In the event that consensus cannot be reached by the JJESC on a JE system, the JJESC will refer the question to its respective principals.

ii) The JJESC will be responsible for establishing processes and protocols guiding its work and the operation of the job evaluation system. These will include the following principles and topics:

- The Managers and MUSA-appointed Employees on the JJESC and the JRC who will receive training in JE. Evaluation of jobs will be done only by those trained in the application of the system.
- The data-gathering tool will be easy to use and computer compatible.
- Because the supervisor determines what work is to be performed, she has the dominant role in establishing the requirements and duties of all positions. Because the Employee is the one closest to the job, the Employee will have input to any process of establishing and confirming job information. After discussion between the supervisor and the Employee, one set of data about

the job will be submitted. The JJESC may establish a process for 'notation' to this data, if necessary.

- If the evaluation process brings to light significant duties, currently being performed by the incumbent with the knowledge of her supervisor, that the supervisor removes from the job prior to the job being evaluated, the JJESC will resolve any attendant compensation issues.
 - Jobs that are sufficiently similar may be evaluated as one job; the JJESC will determine the basis for such grouping, cognizant of the concern that significant differences between jobs not be lost in the process. The JJESC will determine the balance between position descriptions and job categories.
 - The JJESC will establish a process for the JRC to have access to additional information that may be required to assist it in its evaluation of jobs. This may include, but is not limited to: access to the most recent job description for a position, recent job postings, and telephone or in-person interviews with both supervisors and/or incumbent Employees to clarify or augment information provided with actual job examples, as the JJESC or JRC may see fit.
 - The JRC evaluation process will operate on a consensus basis. If the JRC cannot reach consensus on an evaluation, it will put the job aside and revisit it after it has evaluated other jobs. If consensus is still not achieved, the matter will be referred to the JJESC for resolution. If the JJESC cannot resolve it, they will request their respective experts to meet to resolve the issue. If agreement is still not reached, the matter will be referred to the respective principals.
 - Job Evaluations are not grievable. However, once the initial evaluations are implemented, an Employee or a group of Employees may seek reconsideration of the evaluation of her/their job(s) through a process to be established by the JJESC. The JJESC will be the final decision maker in this process.
- (iii) The JJESC will be responsible for developing a pay equity plan, consistent with the requirements of the *Pay Equity Act (PEA)*. In the event that issues arise in the course of this preparation, the JJESC will seek the guidance and assistance of their respective principals, who hold responsibility under the *PEA* for negotiating the pay equity plan.
- (iv) The JJESC will determine the nature and processes of the on-going operation of the job evaluation system after initial implementation, and the maintenance of the pay equity plan. Once the results of the initial job evaluation have been implemented, management may write descriptions of new jobs and establish a provisional

evaluation for the new job in order to recruit expeditiously. Such a provisional evaluation will be reviewed by the JRC (or its successor in maintaining the system) before a final evaluation is determined. The JJESC will determine the process and timing for reconsiderations after the initial implementation of the JE system.

- (v) To assist the JJESC, a list of roles, duties and functions is set out in Appendix A to this letter.

JRC

The role of the Job Rating Committee will be as follows:

- i) Participate in training on the application of the job evaluation system, principles of job evaluation, avoidance of gender bias, and documentation of decisions.
 - ii) Rate all jobs from job content information provided to the Committee and document all decisions appropriately.
 - iii) Seek clarification from incumbents and their supervisors where there is insufficient information to agree on the rating of a job, using a consistent and fair procedure.
- 3) Target timeline for implementation process:
- Appointment of JJESC, JE system selected or developed, all processes in place (i.e. write up system details, factors, formats, acquire rights, train JJESC members, communication to staff and managers, trials etc.) and ready to begin collection of job data - by Jan 1 '04
 - Data collection, rating, reconsideration processes etc complete – by Jan '05
 - Evaluate all bargaining unit jobs - by Jan '05
 - Complete sore-thumbing, pay equity plan developed, finalize results - by June '05
 - Implement results - effective June 16 '05
- 4) The application of the current system while the new system is being chosen and applied to bargaining unit positions.

The current job evaluation system will be maintained by the University until the new system has been implemented. It will be used to establish an interim evaluation for new jobs only; these new jobs will need to be re-evaluated using the new JE system as part of implementing the new system. The current system will cease to apply on the date that the new system is put into effect.

APPENDIX A

Joint Job Evaluation Steering Committee (JJESC)

1. Among the determinations of the JJESC, at various points in the fulfillment of their functions, are the following:
 - i. The gender designation of job classes.
 - ii. The method for collection of job content information for female jobs and potential male comparators (including input from supervisors).
 - iii. Training required for incumbents in filling out the questionnaires.
 - iv. Potential male comparators within the University.
 - v. The schedule for:
 - meetings of the Steering Committee;
 - dates for training of incumbents and Job Rating Committee members;
 - collection of job content information from incumbents.
 - vi. The subfactors in the proposed system (including subfactor definition and ~~statements~~ describing each level).
 - vii. The weight to be assigned to each subfactor in the new system.
 - viii. The final version of the job content questionnaire to be used.
 - ix. The final score for all jobs, based on a “sore-thumbing” process.
 - x. Determine final job classes including combining existing job classes or separating job classes as appropriate.
 - xi. Appeal procedures.
 - xii. Procedure by which jobs may be submitted to the Job Rating Committee in future.
 - xiii. The job rates, including all compensation factors such as wages, benefits, and entitlements (for the purposes of Pay Equity).
 - xiv. Amounts and implementation dates for any required retroactive adjustments.
 - xv. The method of payment to any employees entitled to adjustments.
 - xvi. The grouping of job classes considered to be of equivalent value(banding).
 - xvii. The format for the pay equity plan.
 - xviii. The content of the final pay equity plan.
2. The JJESC will also:
 - i. Oversee the work of the Job Rating Committee to ensure adherence to procedures established by the Steering Committee.

- ii. Designate substitutes for any Job Rating Committee members who leave the Committee (each party to be responsible for its own representatives), and ensure training of new members.
- iii. Attempt to resolve matters where consensus cannot be reached by the Job Rating Committee.